REPORT TO TIGER TEAM FOR SC4 DOCUMENTATION:
Style Manual **(my term)**
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A DISCLAIMER: I have met with the Tiger Team once, so I am not completely familiar with the backgrounds of its members. If I have over simplified and have stated what is obvious to the Team, I apologize.

The SC4 document will be used by editors who probably have not had much formal training in editing. I assume that they were selected because of some facility with the language and an acquaintance with the conventions of English (American and British). Yet, what do we know about these volunteers?

I would like to suggest that someone spend some time developing a thorough profile of these editors and even conducting some usability tests for the document. The profile could come from a well-constructed questionnaire and the usability could come from workshops held during times when the committees are together (such as when they have workshops) or at meetings of the ISO/IPO. Information from both would contribute to making this document useful and accessible for the editors.

Subject matter experts (SMEs) should be recognized as that--experts in the subject matter of the standard. Editors should be recognized as SMEs of style, usage, grammar, document design, visuals design, etc. and should not be challenged as the technical SMEs are not challenged. Part of our responsibility is to make them as expert as we can given the time, budget, and other limitations. When we aren't there to help, this document will be. So we need to make it as responsive to the editors' questions and situations as we can.

Following are some general observations about the Standing Documents, what I have called the *Style Manual*. I have divided the comments into the following areas:
- Layout of the pages
- Helps for the readers
- Writing style
- Content comments

After these comments are some specific comments keyed to section numbers (and page numbers based on 8.5 x 11" pages).

Layout of the pages
The first thing a reader does is to notice how a page is laid out and how accessible it is for the needed information. I noticed a number of layout issues. For example,
- the heads are in a serif typeface. Most research suggests that you want a different

typeface for headings you use in body text.

- the document is in one column. I am not sure that that is the most efficient way to use the spacing for editors. Has anyone put it into two columns? To do so would be to emphasize the examples (that would be in one column).
- specification of fonts. Another issue is the fonts to use. Certainly, the specification should not list exotic fonts, but it seems that there is a basic list of fonts that wordprocessors have. Is the problem that all Standards specify these same fonts?
- specification for using italics or quotation marks–what is the standard followed? Does *Concise Oxford Dictionary* address this issue (I am away from my copy of it)?
- the document seems to be right-justified. That means that there will be a number of rivers (gaps) between words because not all printers can space within words. Most printers space between words.
- is the leading a "single-spacing"? Looks like more than standard single-spacing.
- this document is highly complex and there are a lot of sections, subsections, etc. These are numbered. Yet there are other sections, a level below the subsections, that are not numbered. Should all levels of section have a number? That makes cross-reference much easier and also allows for a finer level of granularity in the index. Also, within each section, subsection, etc., the items are marked in levels as well–dash and lowercase letter and closed parenthesis. The issue is how you will designate the major divisions of text and at what level of granularity.
- some of the examples have numbers and others do not. If all examples had a number, a table of contents for examples (List of Examples) would be possible and added to the front matter. Editors would appreciate such a listing.
- if you were to line up all the document specifications (for APs, AIMs, ARMs, etc.) would the sections align? For example, is Section n.5 always on Documentation of Information Requirements? If so, then why the separate "clause" for each type?

Helps for the Reader

If I understand the situation correctly, the document is meant for editors of SC4 standards rather than for those who wish to use a part of a standard. As such, it seems to me that we should do everything possible to help this person, especially because that person may not have training as an editor other than what this document gives and what workshops SC4 offers. The comments and observations below assume that

1. The reader is an untrained editor.
2. The reader needs help in editing a part.
3. This Standing Document will NOT be an example of what we want the part to look like. Rather, example pages in the document make clear what the various drafts should look like.

Based on these assumptions, I offer the following observations:

- identify the assumed reader and what is assumed. This short paragraph could go in the introduction
- provide the editor with a tree diagram or flow chart showing the ISO Standards process. Key points that the editor must know can be presented in bold or italic.
- provide the reader with a list of the conventions used in the document. What

indication will there be of when the editor is to add material to required wording? What does text suggest that is in bold? Italics? Another example would be the numbering conventions in this document.

- a listing of examples (as mentioned above) will probably be a well-used page. When the editor is doing layout, it is useful to actually "see" what the final product should look like. In addition, the examples should be positive: Do it this way. Negative examples (Don't do it this way) can be confusing and quite incomplete.
- a dictionary/appendix where the editor can find all required wording. It would be simple to indicate any of that wording that the editor can change (italics, bold, underlining for example). This section would also be well used.
- a "cheat sheet" for editors would be helpful. This sheet could be on card stock and contain key points (cross-referenced to the Standing Document). It would be similar to the quick reference cards that come with software programs and are meant for users to use in addition to the manual. Some possible content would be–
  - ✓ Page specifications, including typefaces to use
  - ✓ Editing conventions to use in preparing the draft
  - ✓ Reference works–*Concise Oxford Dictionary*, for example and any others
  - ✓ Uses for *shall/shall not, will/will not, may/may not,* etc. Table form?
  - ✓ Suggestions on sentence and paragraph style
  - ✓ Reminder that someone must read the document they edit. Help them.
- sample pages are needed so that the editor can actually see what these pages look like. They can be set up at 75% and then annotated outside the image area of the sample page. I suspect that once we start making sample pages, there will be quite a few so that it may not be practical from a reader's point of view to include them in an appendix. Rather, having them at the point where the text discusses the item and then constructing a list of examples would be helpful to the editor. In addition, an introductory diagram showing the anatomy of the pages would get the editor ready to understand the concept.
- with so many possible example pages, one model we could use for the full document is an extended Executive Summary (explaining philosophy and any needed details of practice, as examples) followed by a series of appendixes that would contain annotated example pages and reference tables.

Writing Style

We want our editors to emulate our style in this document. Do we have a philosophy of style? Does ISO? There are certain stylistic items mentioned in this document and the others–for example, Appendix E of *ISO/IEC Directives, Part 3, Rules for the Structure and Drafting of International Standards*, 3rd edition. Reference to these (as well as actual points taken from them) would help our editors understand why we want a particular style and what that style is.

As an example, I use the attitudes/approaches to using the passive voice of the verb in not only this document (*Style Manual*), but also the Parts.

- Because there is so much passive voice, the editor could easily get confused as to what he or she is to do and what just happens. A major problem is that when you convert to

active voice, you are now in 2nd person. Leaving aside the cultural problems with this (to some cultures, such familiarity is, if not insulting, certainly unwelcome), active voice versions of sentences where *shall, may,* and the like appear could lose the force of the modal that the standard requires. What happens when *The END_TYPE key word shall be written . . .* becomes *Write the END_TYPE key word*? (See below for more comments on this point.)

- Another problem is that the document is not consistent. Passives appear with considerable frequency, yet there are places where active voice appears (see specific notes report). The editor could easily get confused. (Sections 8.8.1.3 and 8.8.1.4 contain active voice, imperative mood verbs.)

- *Shall* and the other modals offer particular challenges to the editor, especially in this document (and the Part?).
  - ✓ *shall* carries the weight of specific meaning (see Annex E of *ISO/IEC Directives, Part 3, Rules for the Structure and Drafting of International Standards*, 3rd edition, 1997. Also see in that document Section 3.8) The point is that *must* carries with it statutory obligations that a standard (that is voluntary) does not.
  - ✓ What is the effect of 2nd person imperative? Same as *must*?
  - ✓ Reaching a little farther, it seems that imperative mood is used for direct instructions and passive for everything else.
  - ✓ The table of wording shows 4 possibilities:
    - ▸ Required to conform to the standard = *shall/shall not*
    - ▸ Recommend = *should/should not*
    - ▸ Permitted = *may/may not*
    - ▸ Possible and capable = *can/cannot*
    - ▸ Why not use the appropriate word after the = in parentheses with Example n(w)?

- In addition to the passive voice questions, I found a lot of nominalization of verbs throughout. The issues about "legality" are not the same as they could be for passives. Editing of this document could solve this problem.

- Has anyone checked the consistency of the modals (*shall, may, should*, etc.)?

This document is a Committee product, so I offer the comments and invite comments and discussion from the rest of the Committee. I have attached below comments relating to specific elements that I noticed as I read through the document. I have provided section numbers as well as page numbers (based on 8.5 x 11" pages rather than A4 pages).

See you in Bad Aibling

Specific (Section- and Page-Specific) Suggestions/Comments

1. 4.0 [p. 5]: Change the instructional part to actual instructions?
2. 4.0 [p. 5]: High Level Logical Definition
3. 4.1.1 [p. 6]: Put all this in a table?
4. 4.1.3 [p. 6]: Colon use--see 4.1.7 [p. 11]

5. 4.1.4 [p. 8]: Add how to get © in WordPerfect 6/7/8 and Word 7.0.

6. 4.1.5 [p. 9]: Why is the page break problem a problem? (Second paragraph on the page)

7. 4.1.5 [p. 9]: *a ==> an* (--"Some word processors may cause the appearance of ___ additional . . . "; first full paragraph on the page)

8. 4.1.5 [p. 9]: Says to use hyphenation if the spaces inserted between words to make right justification are "Excess space between words. . . ." What is that?

9. 4.1.5.1 [p. 9], NOTE 2: Says that exceptions to point size rule for examples made here. Where?

10. 4.1 [p. 13]: Mentions exceptions to word wrap. What are they?

11. 4.2 [p. 13]: Initial letter of *table* is not capped?

12. Annex A says that a sample follows. Not in my printed copy.

13. 4.2.1 [p. 13]: Caps for Annex?--annex A?

14. Only one entry for annex B
　　　Add

　　　　　　　Williams, Joseph. *Style: Ten Lessons in Clarity and Grace*
　　　　　　　Brusaw, Charles T. and others. *Handbook of Technical Writing*
　　　　　　　Usage dictionary of some kind?
　　　　　　　Other Oxford dictionaries

15. 4.2.2 [p. 14]: Second paragraph (1st full) on page: No serial comma.

16. 4.2.3 [p. 15]: Top. Example needed *before* 4.2.3.1?

17. 4.2.4.2 [p. 17]: Problem with colon--second indented paragraph. See 4.1.7 [p. 11].

18. 4.2.4.2 [p. 18]: What does Clause 2 do? No mention of one.

19. 4.2.4.2 [Top P. 19]: Annexes mentioned. *Must* they be these letters? Or do you letter based on the number of annexes you have (more logical)?

20. 4.2.4.2 [p. 19]: Abstract Test Suite wording not provided here. Where?

21. 4.3.1.3 [p. 22]: When referring to typeface, isn't *roman* lowercase?

22. 4.3.1.3 [p. 22]: Why not restate the list (*The following shall not . . . .*) in the positive?

23. 4.3.2.1 [p. 24; example 3.2]: Example here should have a number?

24. 4.3.2.2 [p. 24]: Comma needed after "'abbreviations'".

25. 4.3.2.4 [P. 25]: Headings as antecedents. Never a good policy to allow headings to serve as antecedents. Headings can change and the editor/author frequently ignores the pronouns in the following sentence.

26. 4.3.2.4.3 [p. 26]: In heading--*Object* cap? In example, it's not.

27. 4.4.2 [p. 28]: Need series of examples for the bibliography entries. Covers only books?

28. 4.4.3 [p. 28]: Line two of text--insert *and* after *construct,*?

29. 4.5 [p. 29]: What about a reference from a normative annex?

30. 4.5.1 [p. 29]: Something on how tables should be constructed?
　　　Divide into alpha-numeric, alpha, and numeric tables?
　　　Organize so as to compare values horizontally or vertically?

31. 4.5.1.2.1 [p. 29]: Table numbers are in arabic and not roman.--Lowercase for *arabic* and *roman*?

32. Composite example of a table? Annotated? Need 3: Alpha, numeric, alpha-numeric?

33. 4.5.1.2.4 [p. 30]: Don't repeat title of table when continued?

34. 4.5.2.1 [p. 31]: "Titles" called "Legends"? Nomenclature for this? See 4.5.2.1, however. (p. 31)

35. 4.5.2 [p. 31]: What types of figures are used?

36. 4.5.2.2.1 [p. 32]: Arabic = lowercase letter?

37 4.5.2.2.1 [p. 32]: Where is *legend* defined?

38. 4.5.2.2.2 (p. 32) uses "Title." See 4.5.2 (p. 31)

39. 4.5.2.2.3 [p. 32] Extra comma.

40. 4.5.2.3 [p. 32]: Have example but no example number. Evidently, the elements do not call for an example number unless they have context.????
    If you have boxed examples (representing a page), how do you signify that in SGML?
        . Have to embed text in the box and that will carry markup as well.

41. In 4.5.1.3 [p. 31], no choice is given *except* to use one of these two ways of introducing tables. In 4.5.2.3 [p. 32], wording is as example. Also missing is "All tables shall be referenced in the text at least once."

42. 4.5.3.2 [p. 33]: Notes (labels) flush left? **NO.** Indent 5 spaces (first sentence of last paragraph). But, paragraph 1, last sentence says that the title and hyphen are "placed at the beginning of the first line of the text of the note. Could get confusing without an example or two here.

43. 4.6.2 [p. 35]: Wording problems here (first sentence)? Badly need an example.

44. 4.6.3 [p. 35]: Suddenly goes into imperative. What is the effect of the imperative? (See 8.8.1.3 and 8.8.1.4 [pp. 97-98])

45. 4.8.1 [p. 36]: *must* = compare here and Part 3 (Annex E of *ISO/IEC Directives, Part 3, Rules for the Structure and Drafting of International Standards*, 3rd edition, 1997. Also see in that document Section 3.8) on use. Some differences. Statutory compulsion for *must*, for example.

46. 4.8.5 [p 38]: *Concise Oxford* places periods after both *i.e.* and *e.g.* ?

47. 4.9 [p. 39]: Change reference to *Concise Oxford English Dictionary*.

48. Does *such as* = Example? What does *and so on* mean?

49. 5 [p. 40]: Colon use

50. 5.1.4 [p. 41]: Second paragraph--")" and "(*"   Compare with ("(*" and "*)")

51. 5.1.10 [p.44]: Spacing in examples **very** important? Also, what are these examples of? Indicate in text a pointer to an example. A word usage--*simply* conveys a negative tone ("It's really simple to most people, but I need to state it for you."

52. 5.1.6 [p. 42]: There is what seems to be examples. Yet, they do not have example labels and numbers. Why is that?

53. 5.1.9 [p 43], paragraph 4: Where are these things dealt with separately?

54. 5.1.12 [p. 44] Code Body: Looks like the text says that there are three things to demonstrate
    A related group of statements
    A tail remark
    Structured elements
Are all three present in the example (#23)?

55. 5.1.13 [p. 45]: Are the spacing requirements based on layout or on the actual requirements of the program? Also, paragraph 6: Is this shown in the example?

56. 5.2.2 [pp. 46-47]: Requires knowledge of EXPRESS?

57. 5.2.2 [p. 47]: Examples--

No number
No positive example for text after second example.
58. 5.2.2 [p. 47]: List of "do the following"--
Why not have some "Not this . . . . But this . . ." examples?
59. 5.2.2.4, 5.2.2.5 and 5.2.2.6 [p. 48]: Need examples here.
60. 5.3.1 [p. 49]: So, what should the example look like?
People will skim for examples and generally ignore text
All positive examples labeled
Don't set up negative examples
61. 5.3.3 [p. 49]: Awkward sentence following the list. Also, a problem with *shall* here is that
the "rule" is subjective. Who will determine "as little overlap as possible"? It seems
that the other uses of *shall* are rather objective.
62. 5.4 [pp. 50-51]:
Why are *j, k, l,* and *m* all lower case? Yet designators for the figure is capitalized
Also, what happens when you get to *z*? Start over at *aa*? Then *bb* or *ab*?
Could the lower case be because letters are used for other things ("aggregate type of
attributes and types")?
63. 5.4 [p. 51]: Seems like a DTD problem is that the physical features are defined in the
formatter. The 2 lines of relationships described on p. 50 (*regular* and *supertype*) need
separate tags because they are to look differently.
OR, will there be DTDs for diagrams?
64. 6.5.3 [p. 53]: Use of colon before EXPRESS specification.
65. 6.5.6 [pp. 54-55]: Need examples. Also, in the 2nd item in the list, add a noun after *this*?
3rd item: Need quote marks around <schema name>type definition: <type name>?
The 4th item has both quote marks and underline. Appropriate? Consistent
throughout? Underlining also appears following NOTE 1: "Enumerated item
definition" -- meant to indicate italics? Item following NOTE 2 is awkward to read
with the wording being special usage for EXPRESS: ". . . are placed within the where
clause of a . . . ." Put *where* in italics or quote marks to clarify reading? Examples in
the next item ("Informal propositions . . . .")?
66. 6.5.7.1 [p. 56]: In NOTE 1--uses active voice.
67. 6.5.7.1 [p. 57]: Figure 1 uses something other than *x* for words. Looks like *x* is for both
words and numbers. Potential confusion? Annotate figure? Put callouts identifying
key points? Discuss the key points in the figure following it?
68. 6.5.7.1 [pp. 58-59]: In British usage (see Kirkman's book on punctuation), do you start a
stack list item with a capital if the one preceding it ends in a semi-colon? See list,
bottom p. 58 and top p. 59.
They are all complete sentences. Why not use periods? There is no *and* following item
e, top p. 59. Why is that?
69. 6.5.7.1 [p. 58]: Listing using lowercase letters following figure--
a) Quote marks around Formal propositions?
a) Noun following *this*?
f) Caps for *where, inverse, and unique*?
g) Caps or italics for *where* used twice?
70. 6.5.7.1 [p. 58]: Next list item--

a) Quotation marks around <u>Informal proposition</u>?

71. 6.5.7.1 [p 59]: Rather hard here to know if NOTE 2 is the example of an actual note to the item above--see p.56 where the note goes with the paragraph above it.

72. 6.5.7.1 [p. 56]: Using dashes for the rules could get confusing. Use another symbol of some kind? What about a lettering system?

73. 6.5.7.2 [p. 59]: Colon here instead of a period? Also, is the listing following an example?

74. 6.5.7.2 [p. 59]: Odd that after all the things needed done that the writer is allowed a subjective opportunity--line above 6.5.8: "reasonable order" = ????

75. 6.5.8 [p. 60], 4th item: Is supporting text set-off in any way? Is it part of the mandated definition the same as the prose definition is a part?

76. 6.5.8 [p.60], 4th item in listing: Should the *n* be in italics?

77. 6.5.9 [p. 60], 1st item: Uses quotation marks. Later, 3rd item, no quotation marks are used. Should such examples be in italics here and elsewhere?

78. 6.6.1.1 [p. 64]: NOTE--The *which* should be *that*. Need semi-colon before *however*.

79. 6.6.1.2 [p. 64]: In paragraph 2, should *nn* be in italics? Also later in Appendix B example (*nn* and *xxxxxx*)? Also, I assume that the sections before "Annex B" example make sense.

80. 6.6.2.1 [p. 66]: Single or double quotes in paragraph 1? Seems a problem throughout.

81. 7 [p.68]: Here and several places, use a pronoun in the first sentence after a heading to refer to the heading. Awkward--especially if the heading changes.

82. 7.5.2.1 [p. 73]: In the NOTE: What's the colon doing after *types*?

83. 7.5.3.2 [p. 73]: When the *Style Manual* mentions *technical discussion*,
What's included?
What's excluded?
Relationship to the main content?
Example?

84. 8.5.2.2 [p. 80]: Examples needed for a) and b)? Also, later ("If the supertype is existent . . . .), colon use? And ("If the supertype is not existent . . . .), colon use? And (or, for a single prototype:), colon use?

85. 8.5.2.2 [pp. 80-82]: The "example" is interrupted several times for normative comments. If keeping this format, why not box or in some way set them off? Is putting them back to the original left-hand margin sufficient?

86. 8.5.3 [p. 83]: In NOTE 1--semi-colon after *entity*?

87. 8.5.4 [p. 84]: Reference in the text for this figure? Discussion of the figure?

88. 8.6.1 [pp. 88-90]: Table 4 [p. 90] has an empty cell. Has a head but no data. Shouldn't there be some indication of the "emptiness" (no data)? What about 3 hyphens centered?

89. 8.6.2 [p. 93]: 11th paragraph--SUPERTYPE is in small caps. Consistent throughout?

90. 8.7 [p. 95], 4th paragraph: Uses *should*--not *shall*? Also below table.

91. 8.7 [p. 95], bottom: Wording here is mandatory (*shall be*), yet it is an option above (*should be*). Why is that?

92. 8.8 [p. 96]: Colon use to introduce the list?

93. 8.8.1.1 [p. 96]: Cap *Annex* in head?

94. 8.8.1.1 [p. 97]: Will there be confusion by using "EXPRESS" as a noun rather than as a modifier ("EXPRESS Listing")? Following the example (top), it's used to modify.

95. 8.8.1.3 [p. 97] and really throughout: It's common to indent example text to distinguish it from regular text (an explanation, for example); but, the text is indented only from the left-hand margin. Why not use a different typeface? Box? Label (e.g., Example)? By the way, what's the rationale for labeling some examples *EXAMPLE n* and some nothing?

96. 8.8.1.3 [p. 97]: Wording (both places) required? *Shall*?

97. 8.8.1.4 [p. 98]: Wording in second paragraph--mandatory? There is this same problem the rest of the way.

98. 8.8.1.5 [p. 98]: Word *below* in paragraph 2 is vague. Where below?

99. 8.8.2.4 [p. 101]: Paragraph 1--put *nnn* in italics. Also, "The second file shall contain a copy of the EXPRESS given in annex A." (1) "EXPRESS" what? Listing? (2) cap for *annex*? Need sample disk label?

100. 8.9 [p. 102]: Example of index entries need indenting.

101. *Annex B* [p. 106]: Want more suggestions for entries in the bibliography?

102. *Index* [p. 108]: What is this an index of? Examples? Text? Bot?